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Major U.S. Federal Regulatory Agency Selects Casepoint to Migrate eDiscovery to the Cloud, Leverage Artificial Intelligence and Analytics, and Achieve Time and Cost Savings

The Agency selected Casepoint for its leading eDiscovery technology, strong security qualifications, and ability to support a complex migration of up to a petabyte of data from a legacy on-premises system to Casepoint's platform.

▶ Overview

A Major U.S. Federal Regulatory Agency sought a secure, powerful, end-to-end cloud-based eDiscovery solution to meet their litigation, investigatory, and compliance needs. They needed a feature-rich solution that could handle massive data volumes and a partner that could help migrate about 1 petabyte of legacy data while simultaneously supporting new incoming data volumes of up to 10 terabytes a month.

The Agency selected Casepoint as its enterprise eDiscovery SaaS solution after a rigorous multi-step evaluation process. The Agency's evaluation factors included assessing software features and functionality, approach to security, migration plan, management and key personnel, past performance, and a competitive proof-of-concept process.

The Client

Major U.S. Federal Regulatory Agency

- **Contract Term:** 5 Years
- **Data Size:**
  - ~1 petabyte of legacy data (for migration)
  - Up to 10 Terabytes of new data per month
- **Client User Base:** 2000+ users across several U.S. offices
- **Client Legacy eDiscovery Tech:** Recommind, Concordance, and Nuix

The Agency chose Casepoint as its eDiscovery technology to reduce costs, improve access to AI and analytics tools, and drive greater workflow efficiencies. Over time, the Agency will be able to retire its legacy on-premises system: OpenText's Recommind

Casepoint partnered with information technology services company Infotrend Inc., who serves as the prime contractor, and Casepoint as the technology provider and support subcontractor on this contract.

◗ The Challenge

The complexity of supporting the Agency included:

⚐ Passing stringent security requirements that included a multi-step and multi-agency security authorization process;

⚐ Passing a one-year pilot phase that included testing a complex migration process as well as handling the ingestion of new data daily before proceeding at full scale;

⚐ A multi-phase migration process: Pilot Phase - migrate up to 20 TB and add new data (completed); Phase 1 - migrate up to 700 TB and continue adding new data (current phase); and Phase 2 - migrate an additional 300+ TB (next phase) and add new data;

⚐ 2000+ user base across several U.S. offices, including users with varying levels of eDiscovery technology experience and technology comfort;

⚐ Complex workflows that required coordination, collaboration, and working among multiple divisions within the Agency as well as multiple government contractors who also support the Agency's eDiscovery operations.

◗ The Solution

The Agency desired a deliberate and methodical phase-based approach with a conservative ramp-up period that would pick up after a set of sequential milestones were met. With an emphasis on security, a one-year pilot period for initial migration planning and testing, implementation of custom features, and rigorous training and onboarding, Casepoint:

⚐ Met all security requirements to achieve FedRAMP Authorization and an Agency-specific Authority to Operate (ATO), including Single Sign-On integration with the Agency's Active Directory;

⚐ Coordinated training activities across the Agency and multiple government contractor teams;

⚐ Documented Agency's processes and configured Casepoint to meet unique workflows.

⚐ Implemented a large number of custom enhancements specific to the Agency's needs; and,

⚐ Achieved several milestones, including the ones mentioned above in a one-year pilot period. The Agency provided full authorization to proceed with a full data migration, ingestion of new data, and a rollout of Casepoint to all offices.
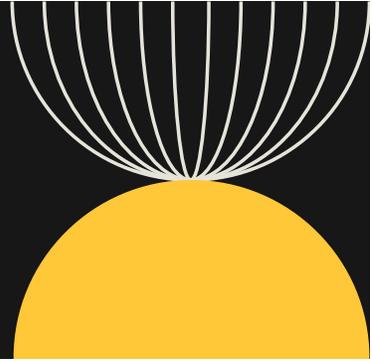
The Agency provided full authorization to proceed with a full data migration, ingestion of new data, and a rollout of Casepoint to all offices.

▶ The Results

〰 Casepoint successfully achieved all milestones required to proceed past the initial pilot period including achieving a FedRAMP Authorization designation, an Agency-specific Authority to Operate, and an onboarding and training goal for a large number of users.

〰 Casepoint supports 2000+ users across Agency headquarters and several U.S. offices.

〰 Casepoint hosted 200+ TB of data in the first year and is now hosting 800+ TB of data with new data being added and processed daily while a full scale migration of legacy data continues.
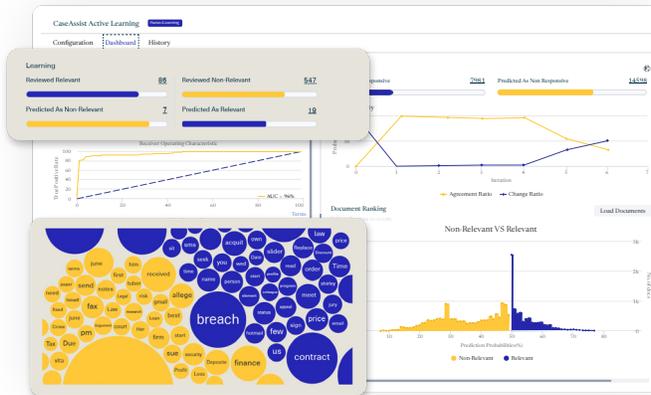

Key Accomplishments (to date)

〰 Achieved FedRAMP ATO for the Agency

〰 Successfully passed the one-year pilot phase

〰 Successfully onboarded and trained **2000+** Agency users and hundreds of government contractors

〰 Delivered **100+** new Agency-specific product enhancements within months of initial award

〰 Currently supporting **2000+** workspaces

〰 Developed and implemented **200+** product enhancements to meet Agency-specific needs

〰 Improved efficiency and saved costs

To learn more about how Casepoint can help your agency achieve similar results, get in touch with our government team at hello@casepoint.com or schedule a demo.

Schedule a Demo
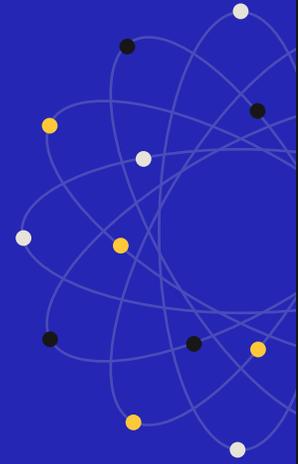
About Casepoint

Casepoint is the trusted data discovery platform for large corporations and government agencies. Our mission is to transform data into actionable intelligence and responsive insights. Leveraging the power of AI and advanced analytics, our end-to-end eDiscovery platform empowers teams to seamlessly collect, preserve, and discover vast amounts of data from diverse sources.

With Casepoint, organizations identify crucial information to address their complex data-responsive needs— from litigation, investigations, regulation, and compliance to Congressional inquiries or Freedom of Information Act (FOIA) requests. Our platform offers an intuitive user experience designed with unmatched security, enabling enterprises to manage their data confidently, enhance efficiency, meet reporting obligations, and mitigate risks. From legal hold and data preservation to cloud collections and eDiscovery, Casepoint streamlines data-responsive workflows.

Our commitment to the customer experience is unwavering. At Casepoint, we're more than just a software provider, we're a trusted partner— a team of experts invested in helping customers meet business objectives and achieve successful outcomes for their toughest challenges. From configuring workflows to ongoing support, we are there every step of the way, ensuring a seamless experience and tangible results. Trust, collaboration, and exceptional customer service are the cornerstones of our approach, fostering long-term relationships built on mutual respect and achievement.

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